“Financial Education” for Educators

Teachers, administrators and other education professionals have unique financial planning needs, especially when it comes to preparing for retirement.

Jeffrey H. Duncan, CLU, CFBS, AEP, CLTC, and his team at Duncan Financial Services, LLC understand exactly what that means.

That’s because Jeff has spent the past 30 years providing educators just like you with financial services including insurance protection, investments, retirement planning, and estate planning.

Because of his many years of experience, Jeff’s services and skills as a planner are especially valuable to those in the education field, as he can help them understand and maximize their retirement benefits such as 403(b) plans, as well as advise people who may not have had the opportunity to do any financial planning at all.

How we’re different

At Duncan Financial Services, LLC we recognize that your unique financial situation, goals, dreams and even fears for tomorrow require a strategy that fits you. That’s why our number one objective is to get to know you first before making any recommendations.

We always listen before any plans are made so we can make sure we have a thorough understanding of your financial objectives. Once we understand who you are and your goals, we’ll work together to address your objectives and develop a strategy to help put you on your path to financial security.

We see ourselves in the role of an educator; keeping our clients up-to-date with relevant information.

All licensed representatives can offer insurance and investments. We believe that it’s our experience, our top-quality service and our long-term relationships with our clients that set us apart from other financial services firms.

Helping Individuals Achieve Financial Independence

DFS Duncan Financial Services, LLC
Insurance and Investments

Our knowledge and experience

Jeff Duncan and the team at Duncan Financial Services, LLC can offer you a full range of products to fit your specific financial planning needs, beginning with essential protection:

Personal insurance and planning

- Life insurance
- Disability income insurance
- Long term care insurance
- Estate planning

Retirement planning

- 403(b) retirement plans
- Roth and Traditional Individual Retirement Accounts (IRA)
- IRA, 401(k) & 403(b) rollovers
- Fixed and variable annuities

Investments

- College funding strategies
- Mutual funds
- Securities brokerage services
- Fee-based asset allocation programs

"It's by listening that we discover what is most important to you. Only then will we make recommendations to help you get to where you want to be."

Jeffrey H. Duncan, CLU, CFBS, AEP, CLTC

At Duncan Financial Services, LLC, we are wholly dedicated to meeting the financial needs of those who work so hard to educate our children – helping people like you protect their families, save for the future, and pass something on to the next generation.

Duncan Financial Services, LLC
Insurance and Investments

For more information on Duncan Financial Services, LLC, visit our website at:
www.financialguide.com/Jeffrey-Duncan

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